

CONSUMER RESPONSE UPDATE

August 2003: Issue N°18

HIGHLIGHTS

- 'Blackout 2003' on August 14, followed by Ontario's state of emergency and power restrictions to August 25, disrupted daily life for millions in North Eastern North America. It also affected consumer response.
- User sessions at OntarioTravel.net declined 15% in August over August 2002. Year-to-date, user sessions are up (+10%) over last year.
- User sessions at TourismPartners.com fell 9% in August over August 2002. Year-to-date, user sessions are up (+21%) over last year.
- Despite the Blackout, fulfillment requests increased 47% in August over August 2002!
- To date, 35,100 consumers have opted to receive e-marketing material from OTMPC!

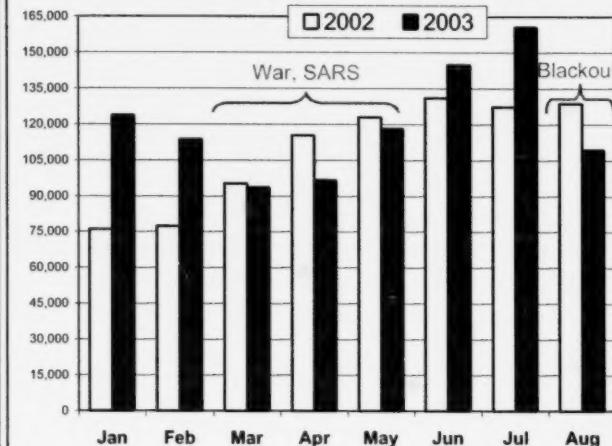
WEB SITES

CONSUMER SITE – www.OntarioTravel.net

- User sessions at OntarioTravel.net in August fell 15% below the level achieved in August 2002. Blackout 2003 contributed to the decline.
- As more than 50 million people across eight U.S. states and Ontario lost power on August 14, user sessions at OntarioTravel.net for the three days following averaged just 2,463 per day. August 1 to 13, user sessions averaged 4,208 per day.
- It is also possible that user sessions slowed in August after a record-high level was achieved in July. Prior to the Blackout (August 1 – 13), user sessions were down 12% versus the same period in 2002.
- In August, user sessions were greatest in volume on August 1, probably in relation to the upcoming Canadian long weekend.
- Despite the drop in user sessions in August, gains achieved before and after the War and SARS boosted user sessions for the period January to August 10% over the same period in 2002.

Note: There was no disruption to Web / Call Centre service during Blackout 2003.

User Sessions at OntarioTravel.net: Jan - Aug, 2003 vs. Jan - Aug, 2002



REGISTERED CONSUMERS

- As of September 4, 55,829 consumers were registered with OntarioTravel.net. 1,940 of these registrations were generated in August.
- Of the registered consumers in OTMPC's database:
 - There is nearly an even split between female (51%) and male (49%) consumers.
 - 96% of consumers are English; 4% are French.
 - 74% of consumers are Canadian, 22% are American and 4% are overseas residents.
 - 35,100 consumers have opted to receive e-marketing material from OTMPC!

PARTNERS SITE – www.TourismPartners.com

- User sessions in August at TourismPartners.com totaled just over 2,900, a drop of 9% over August 2002. Blackout 2003 sparked the decline.

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- Prior to the Blackout (August 1 – 13), user sessions, averaging 112 per day, were more than double those achieved during the same period in 2002. For the three days following the Blackout, user sessions averaged just 46 per day.
- User sessions picked up on August 25 as three levels of government employees across Ontario went back to work, but not enough to recover sessions back to the level achieved in August 2002.
- August user sessions at TourismPartners.com were greatest in volume (208) on August 7, when Premier Eves announced \$1.9 million in funding for tourism projects across Niagara to help the region recover from the economic effects of SARS.
- The most downloaded file from TourismPartners.com in August was OTMPC's 2003 – 2004 Marketing Plan (1,147 downloads).

REGISTERED PARTNERS

- As of September 4, 3,300 partners were registered with TourismPartners.com. 200 of these registrations were generated in August.

CALL CENTRE

- In August, nearly 43,900 calls were received at the Call Centre, a drop of 11% over August 2002.
- In August, calls offered to agents were greatest in volume (989) on August 1, probably in relation to the upcoming Canadian long weekend.
- For a Saturday in August, calls offered to agents were highest on August 9. Perhaps the boost in calls was the result of the Northern Lure Insert drop in Toronto and Winnipeg on the same day. The Insert listed 1-800-ONTARIO as a call-to-action.
- In August, 85% of calls were placed by Canadians. Of this, the majority (85%) came from Ontarians. 15% of calls were placed by Americans. Of this, the majority (67%) came from those in Ontario's border states.

FULFILLMENT CENTRE

- In August, 25,200 fulfillment pieces were distributed to residents of Canada (81%), the U.S. (16%) and overseas (3%).
- Fulfillment requests in August increased 47% over those in August 2002!
- In August, 18% of (or 4,430) fulfillment pieces were ordered online. These online orders helped boost calls over 2002, as fulfillment orders could not be made online in August 2002.
- A strong call to action for consumers to request summer guides in OTMPC's 2003 summer campaign also seemed to help fulfillment orders grow over 2002. The push for guides was not as strong in OTMPC's 2002 summer campaign.
- For the summer season (May – August), four times as many Summer Events Guides and 3 times as many Summer Experience Guides were ordered than in the same period in 2002.

Top Five Fulfillment Requests: August 2003

| | Fulfillment Piece / Guide | Quantity Distributed |
|---|------------------------------|----------------------|
| 1 | Ontario Road Map | 4,002 |
| 2 | Ontario Reference Guide | 2,504 |
| 3 | Summer Experience Guide | 2,115 |
| 4 | Ontario Parks Guide | 2,068 |
| 5 | Attractions Ontario Passport | 1,546 |

- Consumers were also thinking about Fall travel planning in August. 1,022 Fall Experience and 835 Fall Events Guides were ordered in August.

ONLINE PUBLICATIONS

- In August, the Summer Experience Guide (9,244 downloads) and the Fall Events Guide (4,777 downloads) were the most downloaded publications from OntarioTravel.net.

Note: There was no disruption to Web / Call Centre service during Blackout 2003.

ONTARIO
Ontario